Scholarship and Loan Repayment - Responsive Electronic Application for California's Healthcare (CalREACH)

Applicant User Guide
Version 2.0

Table of Contents

1. System Requirements

CalREACH was designed so that the vast majority of computer users will be able to use the system with little or no changes to their computer environment. The four requirements that are mentioned below are common computer elements that should be already present on most machines.

1.a. Operating System

CALREACH was designed for both of the two most common computer operating systems - Windows and Macintosh. It has not been tested and is not supported on other operating systems such as Linux and Unix. Users accessing the system from a Macintosh environment are required to have MacOS 7.5 or higher running on a PowerPC processor. Windows users are required to have an operating system that is Windows 95 or higher.

1.b. World Wide Web Connection

CALREACH is an Internet application. It is accessed via the Internet and was specifically designed for Internet usage. The Internet is the more general term that is typically used to refer to the World Wide Web. The World Wide Web consists of a vast array of content that is accessible via a web browser. For the purpose of accessing CALREACH, the standard Internet connection is via a modem connection. A modem is a piece of hardware that connects to the computer to send data through a phone line to and from the computer. Internet connections that are "faster" than a modem connection, such as cable and DSL, will improve the speed at which the system operates, but are not necessary in order to use the system. If you are in an office environment, you may already have an Internet connection, but if you are unsure, please contact your organization's network administrator.

For those using a dial-up connection over a modem, it is highly recommended that you have a modem connection speed of at least 33.6 kbps (kilobits per second).

1.c. Web Browser

This system was designed to be compatible with common up-to-date web browsers including Internet Explorer, Firefox, Safari, and Opera.

1.d. Adobe Acrobat Reader

Adobe Acrobat Reader is used to view PDF (Portable Document Format) documents. The system will automatically generate grant documents in PDF format using information that has been saved into the various narrative and budget pages. Using Adobe Acrobat Reader you may choose to view, print, or save these documents. If you do not have Adobe Acrobat Reader you can go to Adobe and download Acrobat Reader free.

2.   CalREACH System Homepage

To access CalREACH, type "http://calreach.oshpd.ca.gov/" your web browser and press "Enter." The page you see should look like the image shown below.

3.   Applicant user types

There is one security roles defined for CALREACH – Loan Repayment user: **Applicant**. The security role is summarized below:
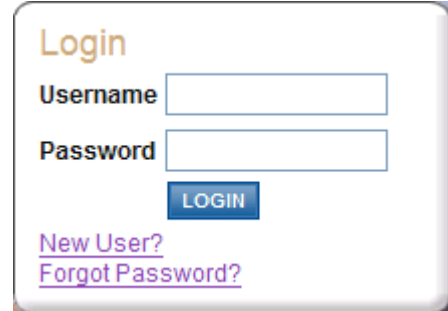
The Applicant will be able to:

- Initiate available grants
- Enter, update, and delete information on applications
- Download and attach files to the application
- Cancel an entire application before submission
- Submit applications to CALREACH
- Check on the status of each application

4. Gaining access to CALREACH

In order to use the system you must:
1. Select the 'New User' link below the Login Button.
2. Complete the user form.

   a) Fill in all information as required. All items marked with an '*' are required to create your account.

   b) The "Username" field must consist of only letters and numbers, 5 to 20 characters long.

   c) The "Password" field must consist of only letters and numbers, 7 to 20 characters long.

   d) The fields "Password" and "Confirm Password" must be the same.

   e) For "Program" drop down box, select 'Loan Repayment'.

NOTE: Once the user has created a user account and gained access to the system, they will never have to request access again.

Having saved your contact information, your account will be automatically created and an email will be sent to you.
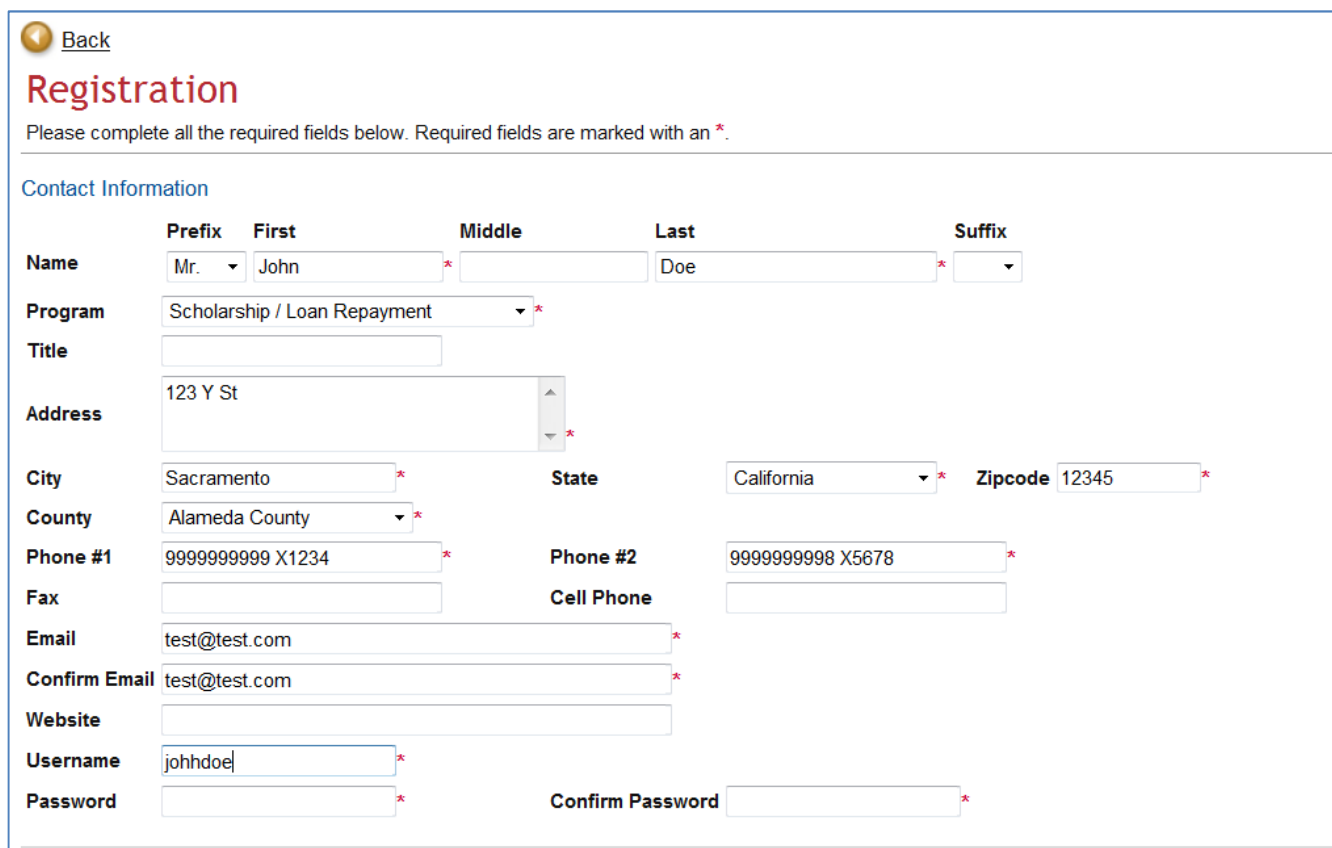
5.   Keeping contact information current

In order to receive continued funding or to enter into new grant agreements, it is important that your contact information be as up-to-date as possible. This is done very quickly and easily in CALREACH. By keeping your user record and agency record current with all of the latest changes, CALREACH staff will be able to contact you appropriately when the need arises.

5.a.   Updating your profile

You may update your user record at any time by following these steps:

1) Click the "My Profile" link on the menu bar on the Main Menu.

2) Update the form and click the "Save" button.

6.   Initiate an Application

The Applicant security role is permitted to initiate applications. In order to create an application, please follow these steps:

From the Main Menu, click the "View Opportunities" button under the "View Available Opportunities" section on the main menu. This section will show you all of the grant program types where you may apply for a new grant.

Illustrations are from the Loan Repayment program. Scholarship screens will be similar.

For those grant programs where you are eligible to submit a new application you will see an "Apply Now" button under the description of the grant. Click the "Apply Now" button.

A confirmation page will appear asking for confirmation. By clicking the "I Agree" button you accept the conditions outlined. An application will be created and you will be taken to the "Application Menu" where you can begin filling out the pages.

The document information will be displayed at the top of the Application Menu.
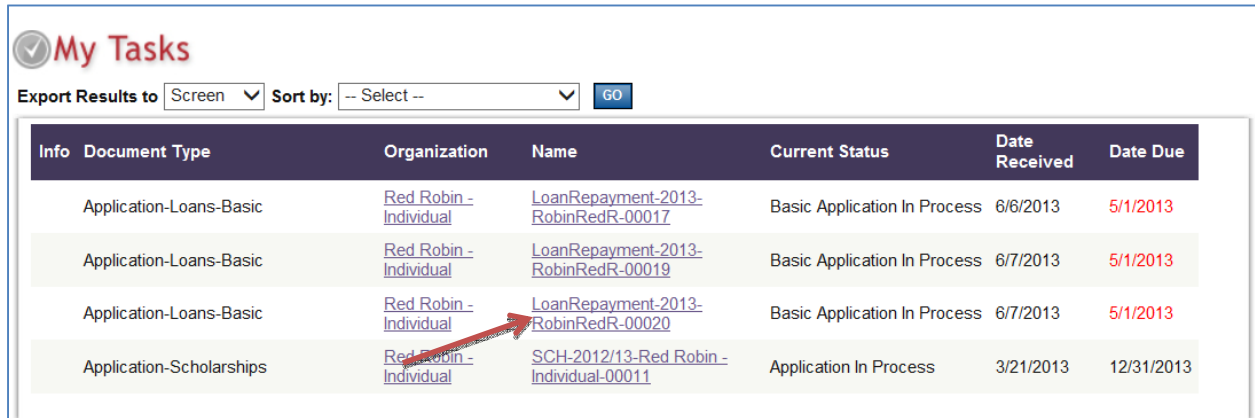
Following the creation of an application, a new task for that document will be under the "My Tasks" section on the "My Home" menu.   When logging into CALREACH, click the "Open My Tasks" button to return to any application previously initiated.
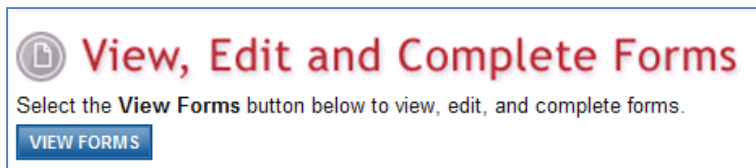

Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	Application-Loans-Basic	Red Robin - Individual	LoanRepayment-2013-RobinRedR-00017	Basic Application In Process	6/6/2013	5/1/2013
	Application-Loans-Basic	Red Robin - Individual	LoanRepayment-2013-RobinRedR-00019	Basic Application In Process	6/7/2013	5/1/2013
	Application-Loans-Basic	Red Robin - Individual	LoanRepayment-2013-RobinRedR-00020	Basic Application In Process	6/7/2013	5/1/2013
	Application-Scholarships	Red Robin - Individual	SCH-2012/13-Red Robin - Individual-00011	Application In Process	3/21/2013	12/31/2013

7.   The Application Menu

The Application Menu is organized into various sections that help to organize the tasks and information. These sections are described below.

7.a.   View, Edit and Complete Forms

The Forms section is where the vast majority of the work in an application is completed. This section contains all of the forms to be completed prior to the application being submitted. To edit application forms simply click "View Forms" and then click on the name of the form you wish to edit.

7.b.   Change the Status

The "Change the Status" section allows the applicant to submit applications or push the application to the next status level. Click the "View Status Options" button to see what status push options you currently have available to you.

7.c.   Management Tools Section

The Management Tools section allows certain administrative responsibilities such as the ability to add/edit people from the application and view the status history of the application. Tools are available based on the security role of the person logged in.

Access Management Tools

Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.

VIEW MANAGEMENT TOOLS

Application-Loans-Basic Menu - Management Tools

The menu below contains links to the tools that can be used to manage this document. See the description below each link for more detail.

Document Information: LoanRepayment-2013-RobinRedR-00020

▶ Details

Management Tools

CREATE FULL PRINT VERSION
Select the link above to create a printable version of the document.

CREATE FULL BLANK PRINT VERSION
Select the link above to create a blank printable version of the document.

ADD/EDIT PEOPLE
Select the link above to perform actions such as adding people, changing a security role, or altering people's active dates on this document.

STATUS HISTORY
Select the link above to view the status history of this document.

CHECK FOR ERRORS
Select the link above to check the entire document for errors.

PROCESS FLOW SNAPSHOT
Select the link above to view the details of the current and next possible status for this document.

ATTACHMENT REPOSITORY
Select the link above to view all attachments in this document.

7.d.   Related Items

The Related Items section is where you will find items that are related to an application or grant. An example of a related item would be a Final Report. It is likely you will not have any related items until later in the grant cycle.

Examine Related Items

Select the **View Related Items** button below to view related items such as claims, messages, etc.

VIEW RELATED ITEMS

8. Assigning Users to an application

The Applicant has administrative rights to add or remove other users to/from applications. (Only users assigned to an organization can be added to a document.)

Any Applicant added to the application will also be automatically added to all corresponding related documents when each is created. New users to CALREACH will not be automatically added to existing applications. However, any user may be manually added to the application throughout the entire application completion process.

8.a. Assign User Access to Application

1) To add users to an application, click on the application of choice in the "My Tasks" Section on the Main Menu.

2) Click the "View Management Tools" button and choose the Add/Edit People link.

3) Type in the name of the individual in the search criteria box and click the "Search" button.

4) From the search results, select the person, give him/her a security role and fill in the access date you would like this individual to access the application.

5) Click SAVE.

8.b.   Remove User Access to Application

There are two ways to remove a user's access to an application. To remove a user's access to an application, on the application menu click the "View Management Tools" button and then choose the "Add/Edit People" link.

6) Edit the access start and/or end date for the user.

| 12/26/2012 | - | 12/31/2012 |

Or

7) For the desired user, in the "Selected" column, disable (uncheck) and save the page. The user will be removed from the application.

8) Click SAVE.

9.   Application Form Completion

If you click on the "View Forms" button under "View, Edit and Complete Forms" on the Application Menu, the various pages of the application are displayed. These are the forms that must be completed before your application can be submitted. The following sections will lead you through the steps necessary for accomplishing that goal.

9.a.   Forms Navigation

There are three basic methods for navigating through the forms of your application. You may use the "Back" link at the top of any page within the application or you may use the links listed in the Related Pages section at the bottom of the page.

Back

Application-Loans-Basic Menu

Document Information: LoanRepayment-2013-RobinRedR-00020
Details

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Application-Loans-Basic	Red Robin - Individual	Applicant	Basic Application In Process	N/A - N/A 05/01/2013 12:00PM EST

By clicking the "Back" button, you will be taken back to the Forms menu and you can click on the next page you wish to complete. You do not have to complete the pages of the application in any particular order.

NOTE: Use the "Back" button" in the system, not the back button on the browser.

The "Navigation Links" can be found at the bottom of the page. To access another page, click on the page name.

Navigation Links

Status	Page Name	Note	Created By	Last Modified By
	Eligibility		Robin, Red 6/7/2013 3:58:24 PM	
	Application Information		Robin, Red 6/7/2013 3:58:25 PM	
	Questionnaire			
	Contacts			
	Lender Information			
	Educational Debt Report Summary			
	Certifications			

9.b.   Form Completion

When filling out an application form it is suggested that you first complete all of those fields for which you have information. Not everyone in each organization will have all of the information necessary to complete each form. Complete as much of it as you can and then click the "Save" button. Fields followed by red asterisks are required fields.

In the creation of some forms the "Add" button is used to create additional forms. Any form that has an "Add" button allows you to have multiple instances of that form. The following picture shows the available "Add" button on a page that multiple pages can be created.

When multiple pages have been created for this particular form, you can choose between them. A dropdown will appear on the far right of the button toolbar.

## 9.c.	Automatic Calculations

When possible, CALREACH will automatically perform calculations.

## 9.d.	Error Messages

If any required field is not completed within an application form or there are business rules violated, an error message will be displayed in red across the top of the page immediately after the Save button is clicked. During form completion it is not necessary to correct errors right away. You may return to the form at a later time and fix errors. If for some reason any errors remain and you attempt to submit the application, you will receive an error and CALREACH will require the errors to be fixed before the application submission is completed. See the example below.

9.e.   Uploads & Attachments

For some pages, form fields are not enough to capture the type of information that may be required. In those situations, a file upload field may be provided to allow you to upload a file instead. Files of the following types are allowed as uploads; doc, eps, pdf, jpg, gif, bmp, txt, avi, wmv, ppt, xls, mov, dpi, png, and mp3. To upload, click the "Browse" button.

Browse to the folder that contains the file you would like to upload and either double-click the file or click the file and then click the "Open" button.
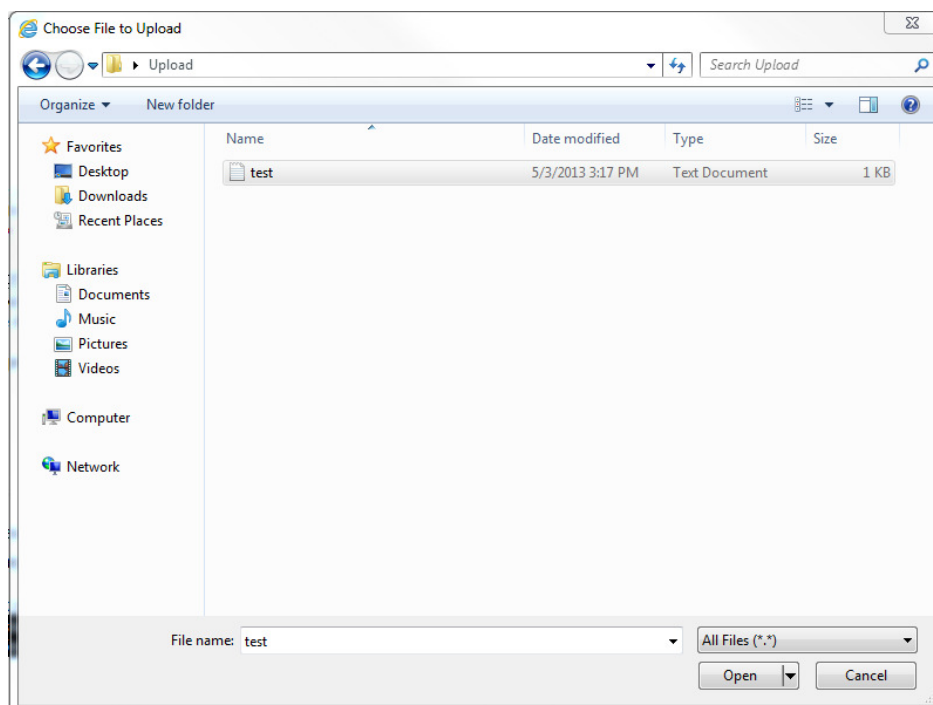
After the page reloads, you must then click the page "Save" button to save the uploaded file.

9.f.   PDF Version

In many pages a "Print Version" button will be available that will automatically create a PDF for you with the data that you provided for each form. These dynamic PDF's can be printed, or saved to your computer for reference. It is a good practice to review the PDF files for accuracy prior to submitting the application electronically.

9.g.   Copy and Paste

Applicants should be cautious while utilizing the copy and paste function of most word processing programs to transfer text into narrative boxes within CALREACH.   CALREACH will not recognize certain formatting, including tables, graphs, photographs, bullets, and certain tabs.   Applicants must also be aware of the character limits of each text box, as attempting to copy and paste text that is larger than the allotted amount of space will yield an error.   The character limit may be found at the bottom left of each text box.   Applicants may want to first copy and paste text into any standard "notepad" (or equivalent) program, which will have similar formatting to the text boxes in

CALREACH. Copied text may appear correct on the screen but still cause an error when trying to print the page.

10. Submitting your Application

When the application is believed to be complete and no more changes are required, the Applicant may choose to submit.

It is important to note that once an application is submitted it will enter into a read-only status and cannot be changed!

To submit, the Applicant must click the "Change the Status" header on the "Application Menu."

⊕ **Change the Status**

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

VIEW STATUS OPTIONS

A list of the possible status changes will be shown on this page. Simply click the "Apply Status" button under the appropriate status change.

Possible Statuses
APPLICATION CANCELLED
APPLY STATUS

APPLICATION SUBMITTED
APPLY STATUS

If any errors exist on any of the application's forms when the Applicant attempts to submit, they will receive an error message directing them to the form(s) with errors. All errors must be fixed before CALREACH will allow an application to be submitted. If no errors exist, the application status will be changed.

✋ **Global Errors**

Document Information: LoanRepayment-2013-RobinRedR-00020
▶ Details

🛑 You must complete this page.
App: Contacts

11. Notes

CALREACH allows for application forms to have notes attached to them. These notes may be used to communicate to other organization staff members or to CALREACH staff who are assigned to the application.

11.a. Adding and Editing Notes

1) To add or edit a note, click on the form you wish to modify. Click on the "Add Note" or "Show Notes" button.
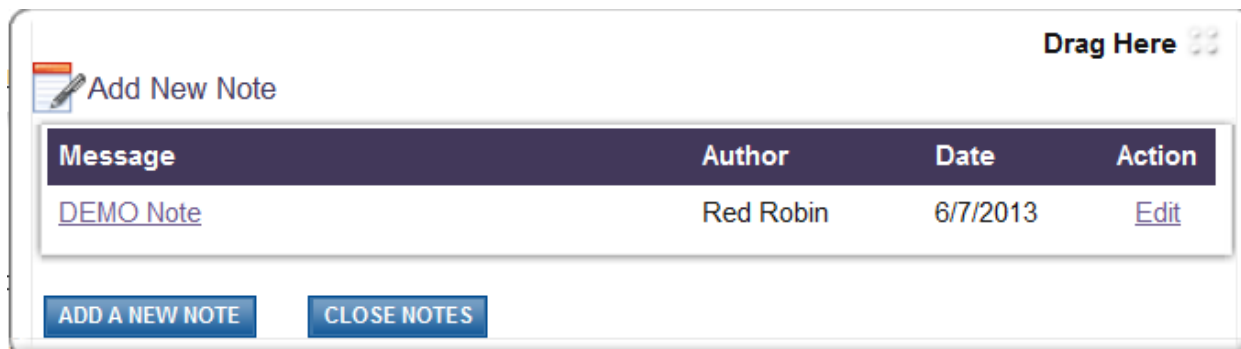
Before you add a note the menu will look like this:

After you add a note the menu will look like this:

2) Any existing notes will be shown at the top of the new window.

a) Each note has the following information: message name, author, date, and action.

b) By clicking on the message name, the note will expand showing the entire note's message.

c) By clicking on either edit or reply under the action column, a note may either be edited (by the user who created the note) or replied (by another user).

3) To add a new note:

a) Click Add a New Note, type in the subject, message, and check the user(s) the note is meant for and click save.

4) Click the "Close Notes" button to close the notes Window.

It is important to remember that the author of the notes has the ability to determine who can and cannot see their note. Notes are an informal method of communication. Any text entered into a note will not be displayed on a PDF and will not be part of the review process.

12. Automatic e-mail notifications

12.a. Automatic E-mail Notifications

Automatic email notifications may be sent to you periodically throughout the grant year. These messages will be sent via the system according to an automatic process or as the result of a user triggered event. These messages might accompany the submission of an application, an application being sent for modifications or a pending due-date that is approaching. These messages are intended to help you know what is occurring in the system that pertains to you or your organization. These messages may also be sent by CALREACH personnel. These messages are designed to help keep you up to date with the progress of your application while also serving as reminders when action is required on your part.

In order to receive these messages it is important that you include an active, frequently used email address when creating your contact record in the system. If you provide an incorrect email address or an address to an account that is either inactive or full, you will not be able to receive these important messages.

12.b. System Messages

In addition to the automatic email notifications, there is an area referred to as the System Messages that manages messages sent to you either from the system itself or from CALREACH personnel. You can view or edit your System Messages by following these steps:

Click the "Open My Inbox" button under the "View My Inbox" section on the main menu. You will now see any unread system messages. You may filter system messages by choosing an option from the drop down labeled "Sort my inbox messages by."

a) Clicking the Subject of a message will take you to the message itself. You can read the message from that screen and then may perform any of the following actions:

(1) Click the "Reply" button to reply to the system message if allowed.

(2) Click the "Close" button to close the system message.

(3) Click the name of the sender to send an email to the sender of the message.